

TOWN OF DAVIE TOWN COUNCIL AGENDA REPORT

AGENDA DATE: September 01, 2004

To: Mayor and Councilmembers

FROM/PHONE: Mark Alan, Director of Human Resources Management (954) 797-1169

PREPARED BY: Mark Alan

SUBJECT: Resolution authorizing the Town Administrator or designee to negotiate an agreement with Carroll Consulting, Inc. in partnership with Information Intellect, Inc. to provide management and facilitation services

AFFECTED DISTRICT: Not Applicable

TITLE OF AGENDA ITEM:

A RESOLUTION OF THE TOWN OF DAVIE, FLORIDA AUTHORIZING THE TOWN ADMINISTRATOR OR DESIGNEE TO NEGOTIATE AN AGREEMENT WITH CARROLL CONSULTING, INC. IN PARTNERSHIP WITH INFORMATION INTELLECT, INC. TO PROVIDE MANAGEMENT ASSESSMENT, ANALYSIS, TRAINING, AND FACILITATION SERVICES; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

REPORT IN BRIEF:

The subject item has been agendaized under the consent agenda. The adoption of this resolution will authorize the Town Administrator or designee to negotiate an agreement with Carroll Consulting, Inc. in partnership with Information Intellect, Inc. to provide management assessment, analysis, training, and facilitation services. On October 03, 2001, Administration requested and received Town Council endorsement to embark upon a program of continuous quality improvement based on the Sterling Criteria for Organizational Performance Excellence and the Malcolm Baldrige National Criteria for Performance Excellence.

Since that time many of the components of such a program have been introduced in Town operations. We are now at an important juncture where it is necessary to assess and analyze our current status as well as effectuate a series of tools whereby continual assessment and analysis aimed at quality improvement and performance excellence will be possible.

Carroll Consulting, Inc. in partnership with Information Intellect, Inc. is exceptionally qualified to assist the Town in these efforts. Carroll Consulting is a State of Florida approved and certified female owned minority vendor (See Exhibit A, procurement form and Exhibit C, Dunn & Bradstreet rating information). Carroll Consulting President Georgette Carroll is a Sterling Master Examiner who has assisted many governmental organizations with their quality improvement programs, among which is 2004 Governor's Sterling Award recipient Palm Beach Clerk of the Court.

Carroll Consulting, Inc. has partnered with Information Intellect, Inc. for this Town of Davie project. Information Intellect, Inc. provides software solutions which will enable the Town to pull together and analyze its vast amount of data from various sources and consolidate pertinent information in an easy to view dashboard format customized to the individual requirements of the Town Administrator, Assistant Administrator, Department Directors, Managers, etc.

Facilitation and training in the Sterling/Baldrige quality improvement model as well as in the use of the computerized dashboard tool will enable the Town to continue to improve in the areas of performance excellence.

Please find attached Exhibit B containing additional detailed information concerning this project and about the qualifications of Carroll Consulting, Inc. and Information Intellect, Inc.

PREVIOUS ACTIONS:	Town Council endorsement of continuous quality improvement program Oct. 03, 2001,
CONCURRENCES:	Not Applicable
FISCAL IMPACT:	\$24,750

Has request been budgeted? Yes

Account Name: Town Administration Special Projects

RECOMMENDATIONS: Staff recommends approval of the Resolution.

Attachment(s):

- Resolution
- Exhibits "A" through "C"

c: Thomas J. Willi, Town Administrator
Ken Cohen, Assistant Town Administrator
Russell Muniz, Town Clerk

MA:ma

0901-R -2004 MgmtAnalysisTrainingServices (cm09/01/04)

RESOLUTION NO. _____

A RESOLUTION OF THE TOWN OF DAVIE, FLORIDA AUTHORIZING THE TOWN ADMINISTRATOR OR DESIGNEE TO NEGOTIATE AN AGREEMENT WITH CARROLL CONSULTING, INC. IN PARTNERSHIP WITH INFORMATION INTELLECT, INC. TO PROVIDE MANAGEMENT ASSESSMENT, ANALYSIS, TRAINING, AND FACILITATION SERVICES; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the Town Council of the Town of Davie has authorized the Town Administrator to embark upon a program of continuous quality improvement based on the Sterling Criteria for Organizational Performance Excellence and the Malcolm Baldrige National Criteria for Performance Excellence; and

WHEREAS, many of the components of a continuous quality improvement program have been introduced in Town operations; and

WHEREAS, it is now necessary to assess and analyze the current status of the Town's continuous quality improvement program as well as effectuate a series of tools whereby continual assessment and analysis aimed at quality improvement and performance excellence will be possible; and

WHEREAS, Carroll Consulting, Inc. in partnership with Information Intellect, Inc. is exceptionally qualified to assist the Town in these efforts; and

WHEREAS, Carroll Consulting is a State of Florida approved and certified female owned minority vendor; and

WHEREAS, it is in the best interest of the Town to accept the State of Florida Contract, Vendor Number: F 550795276 001, awarded to Carroll Consulting, Inc. and to authorize the Town Administrator or designee to negotiate an Agreement with Carroll Consulting, Inc. in partnership with information Intellect, Inc. to provide management Assessment, Analysis, Training, and Facilitation services.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COUNCIL OF THE TOWN OF DAVIE, FLORIDA:

SECTION 1. The Town Council of the Town of Davie hereby accepts the State of Florida Contract, Vendor Number: F 550795276 001, awarded to Carroll Consulting, Inc.

SECTION 2. The Town Council of the Town of Davie does hereby authorize the Town Administrator or designee to negotiate an Agreement with Carroll Consulting, Inc. in partnership with information Intellect, Inc. to provide management Assessment, Analysis, Training, and Facilitation services.

SECTION 3. If any section, subsection, sentence, clause, phrase, or portion of this Resolution is, for any reason, held invalid or unconstitutional by any court of competent jurisdiction, such portion shall be deemed a separate, distinct, and independent provision and such holding shall not affect the validity of the remaining portion of the Resolution.

SECTION 4. This resolution shall take effect immediately upon its passage and adoption.

PASSED AND ADOPTED THIS ____ DAY OF _____, 2004

MAYOR/COUNCILMEMBER

ATTEST:

TOWN CLERK

APPROVED THIS ____ DAY OF _____, 2004

TOWN OF DAVIE PROCUREMENT AUTHORIZATION

ACCOUNT NUMBER.	BUDGET ITEM & DESCRIPTION	APPROXIMATE COST
001-0102-512.05-02	Quality Improvement consulting and facilitation	\$24,750

METHOD OF PROCUREMENT (check the one that applies)

☐ Open Competitive Bidding
☒ Piggyback on Contract Number: State Approved female owned certified minority vendor number:
F 550795276 001: State of Florida SNAPS II # 9732814-1
☐ Sole Source
☐ Request For Proposals

SPECIFICATIONS & LIST OF VENDORS MUST BE ATTACHED

Signed


Department Head

Have Funds been Reserved RESERVED 31844

Date 8/24

Signed 

Signed


Town Administrator

BIDS SUBMITTED

VENDOR	COST
Carroll Consulting, Inc.	\$24,750

Signed


Procurement Manager

BID SPECIFICATION COMMITTEE'S RECOMMENDATION

Vendor	Cost
<u>CARROLL CONSULTING, INC.</u>	<u>\$24,750.00</u>

(Agenda Date: September 01, 2004)

Exhibit "B"



Project Sterling
Assessment and Review

A proposal developed for



***Mr. Mark Alan, Director
Human Resources
The Town of Davie
6591 Orange Drive
Davie, Florida 33314***

Presented by:

Carroll Consulting Inc.
Georgette Bonifacio Carroll, President
5051 Starblaze Drive, Greenacres, Florida 33463
561-969-1961
georgettecarroll@bellsouth.net

in partnership with

Information Intellect, Inc.
Mr. Marc Kallaoun, Vice President
1351 Dividend Drive, Suite G, Marietta, Georgia 33067

August, 2004

Executive Introduction

The Town of Davie has embarked on the Road to Quality over the past several years as the town *aims to be the leader in Broward County in which to live and educate our children, where the rural lifestyle and quality of life have been preserved.* As an extension of the Town mission, Carroll Consulting Inc. offers the unique opportunity to facilitate and evaluate the professional progress of the Town as a role model for municipal excellence in services.

The ultimate goal of *Project Sterling* is to enable the Leadership to merge the principles, values and work processes of the Town into the Sterling Quality Criteria and cascade those approaches and best practices throughout the Town on a continual and consistent basis. Project Sterling will provide a direct link to these Goals and Objectives of the Town for FY 2003-2004.

- ***Communicating*** the sterling framework to the Leadership team enabling a clear understanding of the work in progress to the criteria
- Facilitating an assessment against the Sterling criteria to identify the gaps for consideration in the ***Strategic Planning Implementation.***
- Review and implementation of ***Automated Software*** for strategic decision making through the gap analysis of the currently manual performance data gathering process.
- Providing ***Positive Exposure*** throughout the community by marking progress against a world class process based upon the Baldrige National Award for Quality – the basis for the Sterling criteria.
- Expanding and understanding the impact on ***Customer Service*** as the Sterling criteria uses feedback from your residents and businesses to achieve benchmark performance

Project Sterling also assists in the development of a team based ***Leadership*** staff focused on accountability and delivering services in an efficient manner.

The Proposed Plan

Project Sterling shall provide facilitation and assessment service components as follows:

Leadership Introduction to Sterling – ½ day session

The session shall cover the components of the Sterling Criteria and an understanding of the process and the requirements as well as an overview of the work plan and internal assessment (see next section below). The purpose of this session is to familiarize the Leadership team with the process as a first step in the deployment of the framework and assisting in the communication of the project efforts. If a Sterling Team has not been selected, this session will also allow for the strategic selection of team members.

Assessment of the Sterling Framework – 3 days

A three day session shall be conducted involving the Sterling Project Team with the primary purpose of determining the alignment of the Town's progress to the Sterling Criteria. This session will introduce the participants to the award requirements while drawing on their knowledge and expertise of the Town in making the assessment. It is recommended that at least 6 participants be selected for this team, one for each of the criteria categories. The major components and topics include:

- Sterling Overview and introduction
- Agency Assessment of Profile and all Criteria
- The Drivers
 - Leadership
 - Strategic Planning
 - Customer Focus
- The Work Process
 - Human Resource Focus
 - Process Management
- A Review of Measurement
 - Information and Analysis
 - Performance Results
- Initial Self Assessed Scoring

Assessment Follow up

Carroll Consulting Inc. shall provide on-going support in establishing strategic direction and plans to close any gaps between the initial Sterling assessment and the progress of the Town. This phase of Project Sterling shall include:

- Presentation of the Assessment to the Leadership Team and, as necessary, the Town Council.
- Recommendations for the Strategic Planning Implementation as it relates to prioritizing and closing the gaps in the assessment.
- Developing a plan to manage the writing of the Sterling application with the Sterling Project Team.
- Developing a plan to direct and manage selected projects based on identified strategic initiatives related to aligning work processes towards becoming a *Sterling* organization.

Gap Analysis of the Performance Measurement System

Performance Measurement in the Town of Davie has been evolving over the last couple of years. The Town of Davie is becoming more strategy-focused organization and has clearly defined roles and responsibilities for the Mayor and Town Council, the organizational structure is clearly defined, financial oversight is in place, performance objectives and indicators are aligned with strategy and the opportunities for improvements are clearly defined and budgeted. These indicators are listed in the Town's Operating Budget FY2004 to illustrate the process.

To meet the remaining best practices standards, the Town of Davie is seeking to expand its strategic plan to include:

- Automating data collection and using the data to manage
- Evaluate and respond to results
- Reporting results

Since performance measurement focuses on results, the Town of Davie needs to ensure that this data are readily available for management and policy makers. Performance measurement data need continuous updating to support performance review and decision making at monthly executive briefings and can be linked and aligned to both fiscal and operational planning.

The current manual data collection process is time consuming and almost requires a FTE for managing and organizing the indicators. Information provided by the performance measurement is just part of the information that managers and officials need to make decisions. It must be accompanied by evaluation to increase knowledge of why results occurred and what value they add to the organization. Without the accurate and timely data, managers will not be able to make well-informed decisions and the results are doomed to failure from the start.

Our methodology will leverage technology using a best practices approach, which will automate the performance measurement process and increase productivity as the current data collect process is time consuming and almost requires a FTE (full time equivalent) for managing and organizing those indicators. Our process includes:

- Interview and Analysis for all departments managers
 - Processes
 - Procedures
- IT staff Interview and analysis for existing technology
 - System
 - Infrastructure
- Self-assessment
- Better understanding of the indicators
- Identify gaps between systems and indicators
- Identify indicators linkage between organization's hierarchy
- Make tactical recommendations on how to track the different metrics so anyone can look at the progress toward the organizational goal in real-time

Note that it is important that all management pursue components of the objectives for their area and that all staffs are made aware of the performance measurement and must do their part to collect and record the results

Problem Resolution Investment

The proposed solution will include the followings:

1. Interview and analysis (gap analysis) for the following departments:
 - Town Administrator's Office
 - Budget and Finance Department
 - Recycling and Solid Waste
 - Transit
 - Economic Development
 - Human Resource Management
 - Town Clerk's Office
 - Drainage and Engineering Division
 - Development Services
 - Law Enforcement
 - Fire Rescue Department
 - Department of Public Works
 - Parks and Recreation
 - Special Projects
 - Housing and Community Development
 - Utilities Department
 - Information Services
2. I/T Analysis (Infrastructure/Systems)
 - Perform a detailed data mapping for all indicators
 - Identify the source for each indicator (Interface, Manual Input, and Calculated)
 - Identify gaps
 - Prioritize performance indicators
 - Identify performance indicators linkage
3. Reporting Requirements (Town Administrator)
 - List of Reports
 - Determine presentation layout
 - Identify method of delivery
 - E-mail alerts
4. Recommendations
 - Assign responsibilities and timeframe for completeness
 - Produce a cost break-down for each of the gaps
 - Proposal to automate the data collection for all performance indicators
 - Proposal for Balanced Score Card Implementation
5. Best practices self-assessment
 - Assess the Town of Davie's readiness to execute the strategy
 - Compile an organizational self-assessment report and deliver to the Town Administrator

Budget**Project Sterling****\$24,750**

Professional facilitation, management and instruction to be performed by Georgette B. Carroll, President and owner of Carroll Consulting Inc. and include all services listed above, inclusive of any and all training materials.

Information Intellect shall provide all onsite interview and analysis of the performance indicator process.

Travel expenses and related out-of-pocket expenses shall be billed at cost and are over and above the expressed consulting fees.

Invoicing

Carroll Consulting Inc. shall invoice the Town of Davie in equal monthly payments over the course of the approved engagement, plus expenses. Carroll Consulting Inc. also accepts payment through the State of Florida procurement (VISA) program.

Carroll Consulting Inc. is an approved State of Florida Vendor for all quality related training, consulting and facilitation and is a registered, certified minority vendor with the State of Florida.

Vendor number: F 550795276 001.

Professional Qualifications:

.Georgette B. Carroll, President, Carroll Consulting, Inc

Ms. Carroll founded Carroll Consulting Inc. in 1999 as an organizational and management development service with the primary purpose of assisting organizations in achieving performance excellence by focusing on executive development, strategic business planning, process improvement, training and facilitation using the Sterling and Baldrige framework. She has developed and trained more than 30 different administration and management courses to over 200 groups including the American Society for Quality, the Florida Sterling Council, the Florida Sheriff's Association, Palm Beach County Government and the Florida Government Finance Officer's Association. Ms. Carroll is currently a member of the Florida Sterling Board of Examiners – Master Examiner; and member of the Examination Committee. She completed her Six Sigma black belt certification in May 2000 and her Master Six Sigma certification April 2004.

Education

Florida Atlantic University, Masters Public Administration

Barry University, Bachelor's of Professional Studies

Palm Beach Junior College, Associate in Computer Technology

Information Intellect became an independent company in 1997 by way of a management lead spin-off from Electronic Data Systems (EDS). In 1992, EDS acquired a leading provider of utility software consulting and services, of which the Information Intellect products were a part. EDS organized the acquired company into its Utilities Division, which operated in that capacity until it was spun-off to form Information Intellect, Inc. in 1997. The company's principal shareholder was a division vice president with EDS, before leading the Information Intellect spin-off. The office has a consulting staff, each averaging over 10 years of experience with software solutions and has a long list of very satisfied clients, including municipalities and large corporations with a proven track record committed to ensuring our clients' success.

Many organizations can provide effective solutions and experienced consultants. Carroll Consulting Inc and Information Intellect, Inc. delivers products and expert consulting services within a relatively small corporation. The smaller size of our corporation guarantees that the entire organization will prioritize the overall success of our project. Our entire organization, from the most recent hire up to and including our president, will commit to delivering a level of service and satisfaction that is second to none. This commitment to ensuring the Town of Davie success will set us apart from all other service providers.

Carroll Consulting Inc.
Representative Accomplishments

- ❑ ***Palm Beach County Clerk of the Circuit Court (1999-2003)*** Provided executive training to the senior staff of the Clerk of the Court including Project Sterling and the establishment of the Strategic Planning Process; the Participatory Budget Process and Six Sigma analysis of the Evidence Process. Engagement also included facilitation of the Customer Comment Card Team, establishing benchmarks, and determining the key business performance measures. Recently completed the Florida Sterling Award application process for the 2003 cycle, which was awarded to the Clerk in May 2003.
- ❑ ***Florida Department of Revenue (2002-present)*** Provided a full assessment and intervention of a service center resulting in process changes, management realignment, and cultural shifts that enabled the service center to meet customer and employee requirements. Currently delivering organization wide leadership development and problem solving methodology throughout the state.
- ❑ ***Strategic Planning - as a business owner*** Conducted planning sessions and developed strategic plans for various organizations including the Clerk of the Circuit Court (four cycles) , The Florida Government Finance Officer's Association, The City of Riviera Beach, Village of Wellington Police Services, Finance Department for the City of Boca Raton and the Hillsborough County Department of Aging.
- ❑ ***Change Management and process improvement – as a business owner*** Facilitated team building and change management programs for the Florida Department of Revenue, the Florida Government Finance Officer's Association, The Florida property appraisers organization, the Seminole County Health Department, the Village of Wellington, Escambia County Sheriff's Office, and Laparkan Limited, Inc. of Miami. Facilitated six sigma projects for the Clerk of the Court, and Laparkan, Limited.
- ❑ ***Governmental Experience (1977-1999)*** Ms. Carroll was employed for 22 years in local government, instituting many new and innovative programs and processes for the Palm Beach County Sheriff's Office and implemented the drive for continuous improvement including oversight of 30 improvement teams, the analysis and administration of the Annual Business Plan, Strategic Planning, and the Quality Division. As a member of the executive staff of three sheriffs, she was responsible for financial and administrative services including information systems and a \$210 million operating budget, when she served as the Budget Director and the Assistant Director of Administration beginning in 1986. She also served on the boards of numerous professional organizations throughout the state during her tenure.

Clients Include:

Seminole County, Health Department, Ms. Lynne Drawdy
Florida Department of Revenue, Dr. Jim Zingale
Palm Beach County Clerk of the Court, Dorothy H. Wilken
Broward County School Board, Ms. Donna Young
Village of Wellington, Dir. Francine Ramaglia
City of Riviera Beach, Mr. Paul White, Asst. City Manager
City of Boca Raton, Dir. Mervyn Timberlake
The Gehring Group, President Kurt Gehring
Escambia County Sheriff's Office, Sheriff Ron McNesby
Florida Government Finance Officer's Association, Deborah Girard
Hillsborough County Dept. of Aging Services, Director Mrya Price
Palm Beach County Office of the State Attorney, Dir. Ed Braddy
Pasco County Clerk of the Court, Ms. Paula O'Neil

Exhibit "C"

Supplier Performance Review

Open Ratings



Dun & Bradstreet

Date: 06/22/04

Supplier Performance Review™

D-U-N-S Number for this company: 17-180-1819

The Supplier Performance Review is a report on a single company. This report is divided into four sections:

1. Company Overview

Contains basic location, contact, and operating data available on the company being evaluated. This information comes from Dun & Bradstreet and reflects the current contents of the Dun and Bradstreet record for this company and D-U-N-S number.

2. Supplier Performance Ratings

Provides the supplier's Summary Performance Rating, which is an assessment of likely overall performance, and a SIC-level benchmark, which indicates where the supplier's Summary Performance Rating falls in comparison to other rated companies in it's SIC group. This section also provides Detailed Performance Ratings for key aspects of supplier performance.

3. Buyers Surveyed

Indicates the industries of the companies that have recently provided ratings on this supplier. Individual raters are not identified in order to preserve confidentiality.

4. Distribution of Feedback

Provides a breakdown of the survey responses received from raters of this supplier. For each of the survey questions, the responses, which were provided on a 0 to 10 scale, are categorized as "positive" (9 to 10), "neutral" (5 to 8), or "negative" (0 to 4).

1. COMPANY OVERVIEW (From Dun & Bradstreet records)

Primary Name:	CARROLL CONSULTING SERVICE	Year Started:	1999
Alternate Names:	CARROLL CONSULTING	Year of Current Control:	1999
Address:	5051 Starblaze Dr Lake Worth, Florida 33463-0000	Annual Sales:	\$125,000
Telephone Number:	561 969-1961	Total Employees:	1 total
D-U-N-S® Number:	17-180-1819	SIC/Line of Business:	8742/Management consulting services

Supplier Performance Review is a trademark of Dun & Bradstreet.

* * Page 1 of 3 * *

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Supplier Performance Review

Open Ratings



Date: 06/22/04

Supplier Performance Review™

D-U-N-S Number for this company: 17-180-1819

2. SUPPLIER PERFORMANCE RATINGS

Open Ratings calculates supplier performance scores using a sophisticated algorithm that takes into account the amount of information available on a supplier, the recency of the information, and the accuracy of the raters. Ratings range from 0 to 100, however, this is not a percentile score.

Summary Performance Rating

96



Indicative of likely overall performance

SIC Level Quintile

Bottom ☐ ☐ ☐ ☐ ☒ Top

SIC: 8742/Management Consulting Services

Detailed Performance Ratings

0 25 50 75 100

RELIABILITY:

How reliably do you think this company follows through on its commitments?

99



COST:

How closely did your final total costs correspond to your expectations at the beginning of the transaction?

97



ORDER ACCURACY:

How well do you think the product/service delivered matched your order specifications and quantity?

95



DELIVERY/TIMELINESS:

How satisfied do you feel about the timeliness of the product/service delivery?

95



QUALITY:

How satisfied do you feel about the quality of the product/service provided by this company?

96



BUSINESS RELATIONS:

How easy do you think this company is to do business with?

98



PERSONNEL:

How satisfied do you feel about the attitude, courtesy, and professionalism of this company's staff?

100



CUSTOMER SUPPORT:

How satisfied do you feel about the customer support you received from this company?

96



RESPONSIVENESS:

How responsive do you think this company was to information requests, issues, or problems that arose in the course of the transaction?

99



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Page 2 of 3



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Supplier Performance Review

Open Ratings



Date: 06/22/04

Supplier Performance Review™

D-U-N-S Number for this company: 17-180-1819

3. BUYERS SURVEYED

The most recent feedback obtained on this supplier came from companies in the following industries.

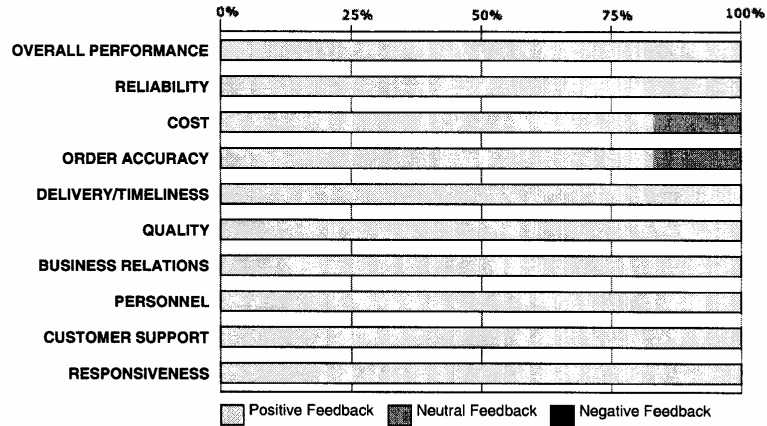
SIC/Line of Business:

- Unknown/not available
- 9111/Executive Offices
- 9311/Public Finance, Taxation, and Monetary Policy
- 9431/Administration of Public Health Programs

Number of surveys completed during the past 30 days is 6.

4. DISTRIBUTION OF FEEDBACK

This supplier's ratings were based in part on survey feedback from past customers. This chart provides a breakdown of the survey responses received from these raters. For each of the survey questions, the responses, which were provided on a 0 to 10 scale, are categorized as "positive" (9 to 10), "neutral" (5 to 8), or "negative" (0 to 4). The percentages of responses falling into each category are shown below.



Note: The supplier ratings set forth above represent the opinions of the surveyed customer references and not those of Open Ratings or Dun & Bradstreet. Some references may not have provided ratings for all performance aspects.

This report is provided under contract solely for use by the customer and a third party as designated by the customer. It is compiled from sources Open Ratings and D&B do not control and whose information, unless otherwise indicated in the report, has not been verified. In providing this report Open Ratings and D&B do not assume any part of the user's business risk, do not guarantee the accuracy, completeness or timeliness of the information and shall not be liable for any loss or injury resulting from reliance on this report or arising out of or caused, in whole or in part, by Open Ratings' or D&B's acts or omissions in preparing this report. This report may not be reproduced in whole or part in any manner whatsoever.

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